



12 Feb.2018

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| CNX NIFTY | 10,455 | (1.2) % | 13.2 % |
| BSE SENSEX | 34,006 | (1.2) % | 13.7 % |
| CNX BANK | 25,464 | (1.8) % | 18.2 % |
| CNX MIDCAP | 19,872 | 0.2 % | 14.7 % |
| CNX SMALLCAP | 8,482 | 0.2 % | 19.9 % |
| GLOBAL INDICES | LATEST | % 1D | % YTD |
| DOW JONES | 24,191 | 1.4 % | (2.6) % |
| S&P 500 | 2,620 | 1.5 % | (2.8) % |
| FTSE 100 | 7,092 | (1.1) % | (7.3) % |
| HANG SENG | 29,507 | (3.1) % | (3.3) % |
| NIKKEI | 21,383 | (2.3) % | (9.0) % |
| SHANGHAI COMPOSITE | 3,130 | (4.1) % | (6.5) % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 64.40 | 0.2 % | 1.1 % |
| EUR/USD | 1.23 | (0.1) % | 2.0 % |
| GBP/USD | 1.38 | (0.8) % | 2.3 % |
| USD/JPY | 108.80 | (0.0) % | (3.5) % |
| USD/AUD | 1.28 | (0.4) % | 0.1 % |
| USD/SGD | 1.33 | (0.3) % | (0.6) % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 61 | (1.0) % | 1.3 % |
| Gold(INR/10g) | 30,007 | 0.4 % | 2.2 % |
| Gold Comex(USD/oz) | 1,320 | 0.3 % | 0.8 % |
| SILVER(INR/1Kg) | 37,792 | 0.2 % | (2.1) % |
| Aluminium(USD/MT) | 2,168 | (0.6) % | (3.9) % |
| Copper(USD/MT) | 6,838 | (2.4) % | (4.8) % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|--------|---------|
| 10 Y GSec US 10 | 2.8 | 0.0 % | 0.4 % |

Global Economy: The US Commerce Department said wholesale inventories rose by 0.4% in December after surging by a revised 0.6% in November. The report said inventories of durable goods climbed by 0.4% in December, matching the increase seen in the previous month. Inventories of automotive goods, lumber, and electrical goods showed significant increases, offsetting a steep drop in inventories of miscellaneous durable goods. The Commerce Department said inventories of non-durable goods also rose by 0.4% in December following a 0.9% increase in November. The UK economy is likely to log steady growth in three months to January, the National Institute of Economic and Social Research said Friday. According to monthly estimates of GDP, output grew 0.5% in three months to January, unchanged from the preliminary estimate of the Office for National Statistics for the fourth quarter of 2017.

Global Equities: US stocks rebounded on Friday following good bargain buying. Heavy losses last week had pulled the major averages down to their lowest closing levels in around two months.

Indian Economy: FICCI welcomes the Central Government's decision to change the criteria of classification of Micro, Small and Medium Enterprises from "Investment in Plant & Machinery and equipment" to "Annual Turnover". The decision will scrap the long-pending MSME Amendment Bill 2015 in Lok Sabha under which it was proposed to increase the upper ceiling of investment in Plant & Machinery and equipment. FICCI has been long advocating the need to have annual turnover based definition for MSMEs as it will bring them in alignment with universal definition and hence easier to create business linkages with global counterparts.

Equity Markets: The local stocks ended the last trading session of the week with strong losses, weighed by weak global stocks. The Sensex settled a tad above the 34,000 level after flirting with that level in intraday trade. The Sensex hit lowest closing level in five weeks. The Nifty hit lowest closing level in more than five weeks. Private sector banks and telecom stocks declined. Index heavyweight HDFC and software major Infosys dropped. Metal stocks bucked weak trend.

Corporate News: India's largest lender, State Bank of India reported a major loss of Rs 2,416 crore in the October-December 2017 quarter, its first Q3 loss in last 17 years. The bank attributed the poor performance to losses in treasury operations at about Rs 2,000 crore due to hardening of bond yields, high provisions of Rs 17,760 crore towards substantial corporate loans slipping into bad loans and a significant hit in investment depreciation of Rs 4,044 crore. HPCL said its net profit rose 22.59% to Rs 1949.69 crore on 13.27% growth in income from operations to Rs 62831.71 crore in Q3 December 2017 over Q3 December 2016. ONGC Videsh led Indian consortium has been awarded 10% stake in Lower Zakum Concession, Offshore Abu Dhabi.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | (346.9) | (92.5) | 12.1 |
| MF(INR cr) | 472.5 | 284.5 | 552.5 |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 35,627 | 43,063 | 33,464 |
| F&O(INR cr) | 528,109 | 921,314 | 641,631 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 33.5 | 26.5 | 11.3 |
| NSE VIX | 19.2 | 17.4 | 12.6 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 25,464 | (1.8) % | 18.2 % | Energy | 13,640 | (0.6) % | 15.4 % |
| IT | 12,493 | (0.8) % | 17.9 % | Pharma | 9,223 | (0.4) % | (12.2) % |
| Metals | 3,986 | 1.3 % | 28.4 % | Finance | 10,467 | (1.8) % | 18.6 % |
| Auto | 11,235 | (1.0) % | 13.2 % | PSU | 3,481 | (1.2) % | (1.3) % |
| FMCG | 26,664 | (0.5) % | 12.8 % | Real Estate | 328 | 0.4 % | 49.7 % |

NSE MOVERS AND SHAKERS

| <i>TOP GAINERS</i> | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | <i>TOP LOSERS</i> | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| SAIL | 94 | 9.2 % | 48.9 % | Glenmark P | 535 | (7.7) % | (37.6) % |
| Hind.Zinc | 304 | 5.7 % | 4.1 % | Sun TV Net | 974 | (3.3) % | 22.4 % |
| Torrent Ph | 1,434 | 3.9 % | (4.7) % | Yes Bank | 326 | (2.8) % | 5.8 % |
| HCL Techno | 964 | 2.1 % | 11.3 % | Piramal En | 2,634 | (2.7) % | 36.0 % |
| Tata Steel | 685 | 2.1 % | 48.0 % | Emami | 1,088 | (2.5) % | 3.7 % |

EVENTS CALENDAR

| <i>EVENT</i> | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|----------------------|-------------|------------------|---------------|---------------|-----------------------|
| No Data Found | | | | | |

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